5 Feb 1968

REPORTS MANAGEMENT PROGRAM

PROJECT OUTLINE

1. Purpose

The purpose of this paper is to provide an outline as to:

      a. Areas of research

      b. General Plan

      c. Objectives

      d. Time Frames

      e. Bench marks

for guidance in the revitalization of the Agency reports management Program.

2. Scope

The scope of the Program covered by this Project Outline is

contained in [   ] as follows:

> "(1) Reports Administration - The analysis, improvement, and control of administrative reporting." [1]

3. Project Objective

The objective of this project is that established by the Chief, Records Administration Branch, SSS as having:

> a Reports Management Program available in this Staff which we can use with a minimum of cost, manpower, and time to provide guidance, assistance, and standards to Records Officers and other interested officials for the improvement and management of reports in their components. [2]

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[1] [   ] dated 25 September 1963; Subject: Records
[2] Memo from Chief, RAB, SSS dated 29 January 1968; Subject: Revitalization of Reports Management Program

4. Assumptions and Constraints

A. Assumptions:

The development of an Agency Reports Management Program must begin with the premises upon which such a Program is based. Such premises are as follows:

(1) The Agency Program will be administered from the Records Administration Branch, SSS through the component records officers.

(2) Program requirements, standards, review , and control will be provided by the Records Administration Branch, SSS.

(3) Component programs will be developed, implemented, and administered, within the Agency framework, by respective Records Officers on a decentralized basis, but subject to review by the Records Administration Branch, SSS.

B. Constraints:

Constraints placed upon the Program by the CIA Records Administration Officer, are:

(1) The Reports Management aid and guide must fit the existing authority [   ] and be persuasive in itself or its obviously beneficial results.

(2) The package and procedure must be economically produceable, easily communicated, and simply implemented.

(3) We need a practical product immediately useable by all Records Officers.

3/ Ibid

handwritten margin notes:
this is true, but it sounds heavy-handed worded this way.

STAT *Do you have other ideas to suggest or do you agree with these parameters for action?*

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5. Research Areas and Methodology

a. "Research", as it pertains to the project, is interpreted as referring to the seeking out of principles and practices relative to the development, implementation, and administration of a reports management program. Generally, such research would involve perusal of the literature, as well as the discussion of on-going programs in other Agencies with the respective authorities. Also involved is a review of the past attempts, and successes of a reports management program in CIA.

b. Such a research would require some time, and in view of the constraint "We need a practical product immediately useable by all Records Officers" intensive research may not be practicable and reliance will have to be placed upon experience already gained in the installation of reports management programs.

c. In view of the above then, the research can assume two concurrent phases. These are:

(1) Review for immediate application the standards and other salvageable procedures developed previously within the Agency reports management program.

(2) Conduct continuing research on an expanded scale as noted above.

Like the others this [is] my staff and throughout the Agency you have all the time and resources possible and we expect the best possible results.

6. General Plan

The general plan outlined below is one for an Agency reports management program, rather than the project relevant to the development of the program. The former implies the latter. The proposed general plan includes:

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a. Developing an issuance outlining the scope, responsibility, and procedures for an Agency reports management program.

b. Developing guides and standards as to the development, implementation, and administration of a reports management program in Agency components.

c. Providing Staff guidance and assistance to Records Officers in the implementation, as well as administration of a reports management program in their respective components. This would include indoctrination as to the philosophy underlying reports management, explanation of standards, and instruction as to administration and central procedures.

7. Program Objectives

Again, program objectives are presented because the purpose of the project is to develop a program with these objectives:

a. Eliminate present unnecessary or duplicate reporting and to prevent it in the future.

b. Insure that instructions, forms, and procedures for necessary reporting are clear and complete, and that they provide the most simple and direct methods of reporting.

c. Insure that the contents of required reports provide adequate data for intended purposes, and that proper reporting intervals are established.

d. Provide central reference points for information regarding reports.

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8. Time Frames

    In the projected records management program for the five-year period from 1970-1974, it was noted that no reports management program now exists as a part of the Agency records management program. Further, a reports management program was seen as requiring a full-time Records Officer. Until this program requirement is satisfied, any effort toward the development and administration of a reports management program needs be on a part-time, and time available basis. Hence, it would be impracticable to establish a realistic time frame for achievement of program accomplishment levels. However, once the decision is made to proceed, and how, a reports management program would then become a part of the records management structure and progress could be monitored.

9. Bench Marks

    As the establishment of a time frame for a reports management program is seen as impracticable, so is the formal establishment of progress bench marks. But here again, once a reports management program is established as an integral part of the overall Agency records management program, the monthly report is the media through which progress on the program can be monitored and provide a basis for shifting manpower, or take whatever other management steps are indicated to take up slack.

10. Other Considerations

    With respect to the overall reports management program objectives and constraints, these would come into play as the development, implementation, and administration phases or bench marks of the program were reached.

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Remarks: Ray:

I had hoped that you would outline a plan for the
development of a Revitalized Reports Management
Program that would emanate from our Branch to
assist all the Agency Records Management Officers.
I had hoped you would manage that Program for me.
Since you will have other duties, like everyone
else in the Agency, I felt you would have to plan
the Reports Program accordingly.

I was looking to your imagination and experience
for the development of proposals to solve our
Reports Management problems. Your 5 Feb. plan of
action attached seems to concentrate on paraphrasing
my explanation of the problems and in calling

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attehtion to the difficulties involved without
suggesting specific actions and goals that might
lead to better Reports Management.

Let us get together and discuss the past and future
Reports Management efforts before you proceed any
further on this Project to revitalize this Staff's
Reports Management Program.